



H.E.L.P

HARVESTERS EXPRESS LEARNING PROGRAM

A Customer Care Training Program

Created For Harvesters Member Agencies

AGENCY MONTHLY REPORT INSTRUCTIONS

Harvesters-The Community Food Network

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Kansas City, Missouri 64129

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www.harvesters.org

Monthly Reporting

Harvesters Express provides the capability for member agencies to submit the required monthly activity reports of their programs online.

- Monthly activity data is critical to Harvesters in collecting information of the meals and or households you serve each month. This data provides essential statistics for funding and resource development as well as indicators of your program needs and Harvesters support of what is required to meet the needs of the people we all serve.
- The process is quick and easy and reduces the amount of time and dollars spent mailing or faxing to Harvesters your monthly activity reports.
- Once you have submitted your monthly report online the data is automatically recorded in a database and interfaced with our inventory system.
- The use of the online monthly reporting system diminishes any lag time between the receipt of your report and reflecting the receipt of you data.
- Additionally the removal of hand data entry of your programs monthly activity diminishes data entry errors by staff in logging your program's specific data.

Program Types

- Monthly Activity reports are a mandatory obligation to remain an active program and retain full access to Harvesters programs and services including the ability to order product from Harvesters Express.
- The report is due the 5th business day following the month activity is reported on. For example, monthly reports for activity in the month of March 2014 are due to Harvesters no later than April 7, 2014.

- Monthly Reports are recorded according to individual program codes of each program your agency administers.
- Note: The online Monthly Activity report requires that a separate report is created for each Program you administer by Program Code.

For Example:

- An Agency distributes food to families with a Pantry Program with program Id No. F##### and serves meals through an On-site meal program with Program Id No. K#####.
- Two Monthly Activity reports will need to be submitted:
 - You will need to log in under each distinct Program code such as the Pantry ID No. F##### and enter the Households served through the pantry activity, submit this report and log out.
 - Then log in again with the On Site Program Id. No K##### and enter the meals served for the reporting period, submit the order and log out.

Submitting a Report

- The Monthly Reports is located in the Report Tab of the ordering site



- You must complete the next to fields for the report to Submit successfully.
 - Submitted by:
 - E-Mail

A screenshot of the 'Harvesters Monthly Reporting for Affiliates' form. The form contains several input fields: 'Program code' (0040PF9993), 'Program name' (Test Shopper), 'Login ID' (F9993), 'Submitted by' (Noreen Zahner), and 'E-mail' (nzahner@harvesters.org). A blue callout box with red arrows points to the 'Submitted by' and 'E-mail' fields, containing the text: 'THE SUBMITTED BY AND E-MAIL ARE MANDATORY FIELDS'. The 'Submitted by' and 'E-mail' fields are highlighted in yellow.

- The Reporting Period is where you indicate the Month and Year that the activity reported occurred.

Harvesters Monthly Reporting for Affiliates

Program code: 0040PF9993

Program name: Test Shopper

Login ID: F9993

Submitted by: Noreen Zahner

E-mail: nzahner@harvesters.org

Report month: February 2007

Use the drop down feature to select the appropriate reporting

- Complete the remainder of mandatory fields highlighted below as shown in the example provided:
 - Did you have enough food to adequately feed all of those you wanted to feed?
 - Please indicate Yes or No
 - What percentage of food distributed by your agency came from Harvesters?
 - Please enter the estimated percent of product you distribute that was obtained from Harvesters.

Report month: February 2007

Did you have enough food to adequately feed all those you wanted to feed?

Yes No

What percentage of food distributed by your agency came from Harvesters?

%

Pantry Data Only

- If you are a Pantry and provide food and non-food products to individuals and families then please populate the questions referring to **Households**.

Note: A program is determined as a **pantry** if bags/boxes of food are distributed to clients to take home and prepare.

- Household
 - A household constitutes as few as one or as many clients that reside together as one unit/group in the same residence.

- Adults
 - *Adult(s)* are the number of client(s) residing within the household between the ages of **18-64** years
- Children
 - *Child(ren)* are the number of client(s) residing within the household between the ages of **0-17** years
- Seniors
 - *Senior(s)* are the number of client(s) residing within the household between the ages of **65 and over**.
- USDA Households
 - This number represents the total number of households served that were eligible and received **USDA food products**.

○ Note Example: The example below reflects a program report for the month of February, 2007.

- The Pantry is reporting that they provided food and product to 200 households.
 - Of those 200 households served the households were comprised of;
 - 300 adults
 - 350 children
 - 150 seniors.
 - Ninety households qualified and received USDA food products.

Report month: February 2007

Did you have enough food to adequately feed all those you wanted to feed?
 Yes No

What percentage of food distributed by your agency came from Harvesters?
 75 %

Food Pantry

Households: 200 Adults: 300 Children: 350 Elderly: 150
 USDA households: 90

On-site
 Breakfast: Lunch: Dinner: Supplemental:

Submit Report to Harvesters

On-Site Data Only

- A program is defined as an **On-site** when meals are prepared at the program site and served to clients for consumption.
 - Meals Served for On-site feeding programs broken down by Breakfast, Lunch, Dinner and Snacks provided.

Report month: February 2007

Did you have enough food to adequately feed all those you wanted to feed?
 Yes No

What percentage of food distributed by your agency came from Harvesters?
 75 %

Food Pantry
 Households: Adults: Children: Elderly:
 USDA households:

On-site

Breakfast: 200 Lunch: 200 Dinner: 200 Supplemental: 0

Note: When the **On-Site report of Meals** served data is populated the Food Pantry data of households and individuals served should be blank.
 The converse is also true
 When the **Food Pantry report of households and individuals** served data is populated the On-Site report of meals served should not be populated

Note: All meals served are calculated on a daily basis. For example if you provide Breakfast, Lunch and Dinner and no supplemental feedings (snacks) to 10 clients a day, five days a week; then the report for the monthly total would equal:

- Breakfast = 10 clients * 20 days = 200 breakfasts

- Lunch = 10 clients * 20 days = 200 lunches
- Dinner = 10 clients * 20 days = 200 dinners

Note: When entering Monthly Activity Reports for multiple months or programs, you will need to logout after completing the current report. Then, login again to enter the next report even when entering multiple reports for the same program. Failure to login and out for each report will result in overwriting the previous report with only the last report entered being saved.

Print a Copy of the Monthly Activity Report

- To print a copy of your Monthly Activity Report for your records you must print a copy prior to clicking the *Submit Report to Harvesters* button at the bottom of the screen.
 - Go to the File option of your menu bar
 - Select the print option



- Once your copy has successfully printed you may select the Submit Reports to Harvesters Tab located at the bottom left corner of the online report.

- You will receive a message that confirms that your report was submitted successfully. Please, print the confirmation page and keep on file with your printed Monthly Activity Report and sign-in sheets.

